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ABSTRACT

For the 1992-93 school year, the Indiana Department of Education awarded planning grants to 10 school corporations and special education cooperatives which applied to be Inclusion School Pilot Sites. Funding was provided for activities related to planning and becoming more inclusive. Visits and interviews at the sites led to conclusions about positive elements to include in planning, from the perspectives of teachers, administrators, parents, and student participants. The interviews addressed: proportions of students with disabilities, mission statement for the school, faculty participation in the planning project, professional development experiences, collaboration and teaming, special education teacher's schedule for collaboration, team communication, homeroom assignments for students, opportunities for student-student interactions, extracurricular participation, and social networks. The schools involved found that the decision to initiate change, and subsequent decisions about how to create it, must come from the local building level. Individuals must feel that they have power to determine changes which will impact their classrooms. Time must be taken to engage in essential planning--to get ideas flowing, allow for false leads, and try again. Two "prized" activities in the planning process were visitations to existing inclusive schools and time for local planning team meetings. A copy of the interview guide is appended. (Contains 21 references.) (JDD)

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Planning for Inclusion

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Planning for Inclusion

Abstract. Results are presented of a state-wide project which emphasized initial steps of planning prior to implementation of inclusion of students with special education needs into general education classrooms. Visits and interviews at each of ten pilot sites led to conclusions about positive elements to include in planning from the perspectives of teachers, administrators, parents, and student participants.

Planning for Inclusion

Although documentation of the successes of general classroom inclusion of students with disabilities comes in many forms (e.g. Affleck, Madge, Adams, & Lowenbraun, 1988; Kozleski & Jackson, 1993), the time for arguing for its existence is past. Numerous professional organizations and societies have recognized that inclusion can be advantageous. Indeed, even those who attest to the need for caution (e.g. Learning Disabilities Association, 1993) are quick to assert the viability and value for some learners with disabilities. The arguments now are not about whether or not one should advocate inclusion but, instead, the elements and procedures which are the most appropriate to provide (Fuchs & Fuchs, 1994).

Yet, even as schools are moving to some form of inclusion, they are discovering times when all does not go well. There may be teacher distrust and discomfort. General classroom teachers' needs for preparation about ways to effect inclusion, as well as assurance of sufficient classroom support, may not be being met. We have heard stories--we've all heard these stories--of the principal who simply appears at the classroom door with a child who, heretofore, had been totally segregated and now says, "Teacher, we're doing inclusion. He's yours." This, we would assert, is *not* inclusion. Even though the identified learner is now physically situated in a general education classroom, there is no reason for believing that the classroom actually *includes* the learner either academically or socially (Murray, 1993). York, Doyle, and Kronberg (1992) maintain that, "Proximity is a necessary but insufficient condition for inclusion" (p. 4).

Inclusion, most would say, is not a thing but an idea--an idea which has come to have wide acceptance. It is an idea that is compatible and attached to many schools' considerations as they take new looks at themselves and adopt new structures (Cloud, 1992) and processes (Sarason, 1990; Stainback & Stainback, 1990).

Inclusion may be defined, in a broad way, as having such aspects as: students being in general education classrooms with age mates, having individualized and relevant learning objectives, and being provided with necessary supports for learning. It does *not* mean that students spend every minute of the school day in general education classes--never receiving individualized instruction--or that they are there to learn the core curriculum only (York, Doyle, & Kronberg, 1992).

In fact, in many schools inclusion is preferred by teachers, students with disabilities, and general classroom learners as well. Indeed, one finds general education classroom teachers arguing *for* including all learners in their classrooms--as if it was unthinkable that anyone considered putting them someplace else (Miller, 1993a). The difference between those schools which are avid proponents of inclusion and those which are not may well be in the amount of investment the schools have made in planning and involvement of all stakeholders as the move to inclusion has taken place.

Surprisingly, among all the literature promoting, describing, and evaluating inclusion, little is available describing the steps a school should take in preparation. However, the actions leading to facilitation of inclusion in a school can parallel the same kinds of steps as those leading to any educational innovation and change (Ayres & Meyer, 1992). Many of the school reform and restructuring activities which began to occur in the 1980s had diversity of students as their focus, which included providing more appropriate education for students with disabilities within the total system (Morsink & Lenk, 1992). Therefore, the stage began to be set for actions schools needed to take as they became more inclusive.

Elements of School Change

First, it is clear that one can neither mandate nor demand an educational change and expect it to occur successfully (Shaw & Campbell, 1992). Instead, change

may be a response to reports and calls for change (Sarason, 1990) or to "grass roots" recognition that the need for a change exists (Mauriel, 1989). It is also clear that any change which does have promise must originate at an individual school level rather than being forced from above . Essential ingredients for success include staff time for implementation as well as administrative support and training. Additionally, participants must be willing to "let go" of traditional roles and make a commitment to common goals (Morsink & Lenk, 1992).

The emphasis which should be placed on local school-based decisions and planning must not be understated. In order for personnel to be motivated toward a change in approach, they need to have a sense of their own efficacy and feel support and interchange with others around them (Clark & Astuto, 1994). Change in a school is more likely to happen within an atmosphere of both support and collaboration. Numerous reports advocating change in schools profess that teachers should have power over their own practices by having an influential role in making decisions about these practices (Sarason, 1990).

Identifying and making provisions for *all* stakeholders to feel that they are participating and collaborating is also needed. Stakeholders can include, at a minimum, central office administrators and school board members, building administrators, both general education and special education personnel, parents of both general education and special education students, and both general education and special education learners themselves (Ayres & Meyer, 1992; Mauriel, 1989). Some have also found that, in making a change in the school, it is important to first allow teachers and other personnel to volunteer to participate. The involvement of others is then observed to build over time (Mauriel, 1989).

Time is also recognized as essential as teachers participate in decisions about new roles and implement any change. Time is necessary not only for planning but

also must be built in for the "personal, interactive relationships" needed to support learning (Clark & Astuto, 1994, 520). Time for joint planning contributes both to meaningful, shared planning about learners and to those planners feeling valued and connected (Salisbury, Palombaro, & Hollowood, 1993).

To become inclusive *is* to change--to restructure. The lessons schools have learned about planning and the process of change in other restructuring efforts applies to planning for inclusion as well. However, literature showing how this application can be made is rare with the exception of a few "how we did it" examples (e.g. Kaskinen-Chapman, 1992; Salisbury, Palombaro, and Hollowood, 1993; Schattman, 1992). An example from Indiana illustrates activities which can be undertaken as a part of planning for inclusion and the effects that these can have on schools themselves.

Effects of Planning

For the 1992-93 school year, the Indiana Department of Education awarded planning grants to ten school corporations and special education cooperatives which applied to be Inclusion School Pilot Sites. According to enabling legislation, a Special Education Inclusion Pilot School was defined as: "A building in which all students residing in the school building attendance area attend the building and, further, students with disabilities are served, to the fullest extent possible, in general education classrooms. Special education services are provided in the general education classroom" (Indiana House Enrolled Act 1396, 1992). Funding was for activities related to planning and becoming more inclusive.

A diversity of sites and types of projects were funded. Sites varied from single school buildings to many, from one school level only to all levels, and from single schools in rural areas to multiple schools in large, metropolitan regions. Project activities ranged from using the grant year as a planning and training year, to some

implementation, to planning and then full implementation (Miller, 1993a).

Schools found themselves making many of the discoveries described above. That is, planning teams were necessary, and these were most beneficial when they deliberately included the widest range of people. Some quickly found that planning and change had to occur at a local, individual building level. If there was a sense that change was in response to an "edict from above," planning teams felt much less empowered or committed.

General education and special education personnel began to participate in a variety of preparation/training activities. While inservice sessions by experts from outside the school were used, participants frequently rated these as less beneficial because the consultant did not address specifics of their school. Two activities were prized in each of the schools that used them. One was visitations to existing "inclusive" schools to view inclusion in action and to interact with the personnel there. Teachers and parents found it difficult to envision inclusion by reading about it or hearing about it--they needed to see it in action and to explore it with practicing proponents. Even when personnel visited sites to which they had negative reactions, they often regarded the visit as beneficial. They commented that it gave them a sense of what *not* to do, and it gave them an opportunity to discuss that.

A second, valued activity was local planning team meetings. Grant funds allowed personnel and parents to meet, explore, and interact for times that were not available otherwise. Numerous comments were made by those who participated in these meetings about their appreciation of what they can learn from each other. At times their experiences were reinforced by connections with other schools and university-based consultants.

In order to judge effects of the project activities, team visits were planned to each of the sites. Visiting teams were led by a university-based person and included

an administrator and teachers from nearby school corporations. The state special education office requested this composition, feeling that a team which contained representatives from each of these groups would add to the credibility of findings. These visiting teams observed in classrooms and interviewed representatives from each of the stakeholder groups--central office administrators, building administrators, general education classroom personnel, special education personnel, related services personnel, parents of children with disabilities, and both general education and special education learners themselves. An interview guide was constructed based on items from instruments found to be effective in others' research (Halverson, Smithey, & Neary, 1990; Wilcox & Sprague, 1992), and an overall report was prepared for each site (Table 1.). Responses to interview guide items of the guide illuminated significant impacts that had resulted from project year activities.

Natural Proportion of Students with Disabilities (IEP Students)

A first issue was a vocabulary issue: the way to refer to the multiplicity of types of students who had been in special education placements but could now be in general education classrooms. It was necessary, for funding and services purposes, to distinguish between them and other learners who had different special learning needs. Because students who had been in special education had each had an Individualized Education Program (I.E.P.) written for them, it was decided to refer to them as IEP students. Prevalence of IEP students in project sites was usually consistent with prevalence rates in the corporation as a whole. Sites which had implemented inclusion for students with all types of exceptionalities were discovering that the numbers of IEP students decreased because students' needs were being met in general education classrooms.

Neighborhood Schools

All recognized the importance of having IEP students in their home schools. They had either accomplished this already, or they had plans to implement for the 1993-94 school year.

Mission Statement

Although none of the corporation or building-level mission statements specifically addressed IEP students or inclusion, each was worded in a way that referred to "all" students and, therefore, included those with disabilities.

Faculty Participation in Planning Project

Each of the sites found the value of a team approach to planning. Several sites noted that as the year progressed additional personnel were requesting to participate. Participating teachers and others were excited about the directions the schools were moving. Participants on planning teams were highly supportive of inclusion and eager to begin.

Professional Development Experiences

Project sites discovered immense value in a variety of professional development experiences, including visits to inclusive schools, inservice sessions for all who could be involved, regularly meeting for as much as one-half day a month for planning, consultants from universities or inclusive sites, and attending state, national, or special-purpose conferences. Knowledge and attitude development experiences for general education classroom students also was provided. Students profited from focused discussions by guidance or special education personnel; disability awareness days or weeks were utilized as well.

Collaboration and Teaming

Time, again, was stressed--here for both general education classroom and special education teachers to meet to share information and to collaborate. Time for

planning was a significant concern--not easy to find even when emphasizing its importance. A concern, for those who were just beginning to implement inclusion, was teachers' adjustment to having more than one adult working in a classroom. Another concern was developing the concept of "team."

Special Education Teacher's Schedule for Collaboration and Team Communication

All recognized the importance and value of communication among teachers. However, most sites had not yet found a mutually-satisfactory system for accomplishing this. Teachers again stressed necessity of regular meeting times.

Homeroom Assignments; Participation in General Education Classrooms

Inclusive sites investigated ways for IEP students to participate in general education classroom curricula. All sites were making plans to move in this direction. Implementing sites demonstrated the curriculum was the same as for general education classroom students with modifications individually determined. Teachers discovered that they could find ways to include IEP students from a variety of mild-to-moderate disability categories.

Opportunities for Student-Student Interactions

Teachers in inclusion classrooms noted that non-IEP students often eagerly interacted with IEP students. IEP students desired to be in general education classrooms with the opportunities for friendships they could make in those settings. A positive discovery was that behavior problems of IEP students had decreased and appropriate classroom behaviors increased. It was noted that when social interactions were less positive, students who had learning/task orientation difficulties were more likely to be affected than were students who presented diverse physical challenges.

After School; Extracurricular, "Special Subject" Participation

Although some sites had several positive stories to tell, among the sites there were mixed reports about IEP students' actual participation in extracurricular activities.

That is, IEP students were not found to be participating in extra opportunities any more than they had before moving to inclusion or home schools. It was unclear whether this was due to students not making choices or to schools not actively soliciting their involvement.

IEP Students' Social Network

Most sites found positive evidence of social networks expanding. Lines between IEP and general education students quickly blurred.

I.E.P.s

As sites implemented more inclusive practices, they found general education classroom teachers attended I.E.P. conferences more regularly, though they still displayed some uncertainty as to their roles. Annual goals were being written using general education classroom curriculum goals as their bases.

Instructional Delivery

Teachers noted that when they made instructional changes, these affected all students who had learning difficulties, not just IEP students. Teachers were able to list a substantial number of effective approaches for instructional delivery.

Principal's Supervisory Responsibility

It was consistently agreed that the principal's role was central to inclusive practices in the school. Teachers described this role as facilitating and supporting the team building process, the one to deal with scheduling issues, "empowering" staff, being an advocate for team decisions, and recognizing responsibility for IEP goals.

Special Education Teacher's General Education Classroom Responsibilities

Ways identified for special educators to have equivalent and participatory roles in buildings were for them to attend faculty meetings, participate on school committees, supervise extracurricular activities, and provide building supervision. Mixed reviews were present on the frequency and regularity of special educators' participation.

Related Services Personnel

Sites reported less success in obtaining an "inclusion" involvement from related services personnel such as speech/language pathologists, occupational therapists, physical therapists, and school psychologists. Still, some were attempting or aiming toward finding ways to achieve integrated therapy.

Preservice Needs

Participants were eager to share ideas on ways that teacher preparation programs for both special education and general education classroom personnel could better prepare teachers and others for inclusive classrooms. Topics frequently listed were: collaboration, information about specific types of disabilities, and instructional modifications. The most frequently-listed items were the need for early and continuing observation and experience in inclusive classrooms.

Discussion

The Indiana experience highlights several points illustrating the importance--indeed the necessity--of planning for inclusive schooling. First, the schools involved re-discovered several of the conclusions others have reached about effecting change in schools. These schools found that the decision to initiate change, and subsequent decisions about how to create it, must be from the local, building level. Individuals must feel that they have power to determine changes which will impact their own classrooms or the classrooms of their children. They also determined that one cannot force change. In fact, battling to win converts takes too much time and energy. It is preferable to begin with personnel who volunteer to participate, who recognize the risk, and allow them the chance to try out different ideas. Even failures need to be supported and regarded as learning experiences (Clark & Astuto, 1994).

Second, planning activities are worth the effort, and time must be taken to engage in essential planning. An important finding was that one must allow for some

"discovery" time. Not all meetings or events happen with a planned agenda. Some time needs to be allowed to get ideas flowing, to allow for false leads, to fail, back up, and try again. An exciting discovery made by many of the participants related to the talent, the experience, and the creativity of the people in their school. The daily rush does not always permit these finds, but having time to interact and collaborate does.

Finally, inherent in each of these activities was an enthusiasm that was different from that present in the usual teaching day. Participants had a sense of being explorers and change-agents, and that brought its own enthusiasm. It was pleasurable, even during the difficult times, to be a part of change and innovation in their schools. And it was particularly rewarding when there was evidence that the hard work and planning was in fact creating interactive, inclusive classrooms for all learners.

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Table 1. Interview Guide: Effects of Planning for Inclusion

Inclusion School Pilot Sites

Site Report

School_____

1. Neighborhood Schools Ask:

   -Are special education students in their "home school"?

   -Do special education students this school neighborhood go to others' schools?

   -Decision to place if not home school--school corporation's? parent's? other?

   -Future plans

2. Natural Proportions of Students with Disabilities (IEP Students) Ask:

   -Number of special education students compared to number of students in building (over 12%?)

   -Numbers of different types of disabilities within expected incidence?

   (LD & CD 3 - 5%; MiMH 2 - 3%; others 2% or less)

   -Assigned to general education classrooms (does any one room seem disproportionate?)

   -Future Plans

3. Mission Statement Ask:

   -Is there a mission statement or written description of purpose of this school?

   -Does it address outcomes for all students?

   -Does it specifically address benefits of inclusion?

   -Future plans

4. Faculty Participation in Planning Project Ask:

General education classroom teachers:

Special education teachers:

-Planning for inclusion

-Implementation

-Feedback and evaluation

-Future plans

5. Professional Development Experiences Ask:

-Visits to inclusive school sites

-Inservice sessions (attended? planned for future?)

-Special conferences attended

-Consultation to school from others

-Future plans

6. Collaboration and Teaming Ask:

-Written schedule for teachers to plan and collaborate

-Regularity of teachers actually getting together to plan for students

-Relationships for working between general education classroom teachers and special education teachers

-Special educator in general education classroom:

-Consulting and advising teacher

-Working with individual students or small groups of students

-Working with IEP students only or others as well

-Team teaching

-Future plans

7. Special Education Teacher's Schedule for Collaboration Ask:

-Regularity of contacts with general education classroom teachers who have contact with IEP students

-Regularity of time in general education classroom

-Reasons for variation in times among different classrooms

-Times (or subject matter) particularly used

-Future plans

8. Team Communication Ask:

-Regularity of communication

-Types of communication (oral, written, bulletin boards, other)

-Evidence of effectiveness of communication

-Future plans

9. Homeroom Assignments; Participation in General Education Classrooms Ask:

-Homeroom assignments for all students

-Age appropriateness

-Assigned personal space within general education classroom for IEP students

-Amount of general education classroom time for students with different types of disabilities

-Participation in same curriculum activities as age peers

-Future plans

10. Opportunities for Student-Student Interactions Ask:

-Settings available for interactions (classroom; lunch; extracurricular activities; traveling to and from school)

-Teacher-directed student interactions

-Spontaneous student-student interactions

-Curricular

-Informal/social

-Future plans

11. After School: Extracurricular: "Special Subject" Participation Ask:

-Inclusion in "special subjects (art, music, PE, home ec, other)

-Opportunities to participate in clubs; field trips; assemblies

-Opportunities to participate in after-school clubs and events

(Note: if not participating, who made the choice?)

-Future plans

12. IEP Students' Social Network Ask:

-Opportunities to interact

-Directed activities (e.g. peer teaching; special buddies)

-Social network exists, including both IEP and general education class age peers

-Other specific activity designed to provide networks (e.g. MAPS)

-Spontaneous/informal instances

-Future plans

13. I.E.P.s Ask:

-Number of curricular areas addressed as part of inclusive setting

-General education classroom teacher participation

-Goals written congruent with general education classroom curriculum goals

-Adaptations of general education classroom addressed

-Stipulation of person responsible for goal

-Variations in IEP since inclusion

-Evaluation based on general education classroom curriculum goals

-Parent and child participation in planning

-Future plans

14. Instructional Delivery Ask:

-Adaptations made in usual general education classroom materials and teaching approaches

-Accommodations made to student's specific disability

-Approach to inclusion (e.g. cooperative learning groups; peer teaching)

-Future plans

15. Principal's Supervisory Responsibility Ask:

-Principal has responsibility of supervision of special education teachers comparable to responsibilities for all general classroom teachers

-Future plans

16. Special Education Teacher's General Classroom Responsibilities Ask

-Special education teacher has equal responsibility and participates in:

-Faculty meetings

-School committees

-Supervisory duties (hall; lunch; bus)

-Extracurricular activities (clubs; chaperone events)

-Works within school procedures

-Future plans

17. Related Services Personnel Ask:

-Participation in inclusion program planning (#4)

-Participation in professional development experiences (#5)

-Regularity of schedule to collaborate with general education classroom teachers

-Consultation focuses are student's inclusion in general education classrooms

-Future plans

18. Preservice Needs: recommendations for new teachers. What should be included in teacher preparation in order to better prepare new teachers for inclusive classrooms?

-General education classroom teachers?

-Special education teachers?

-Others if pertinent: principals, therapists, psychologists...